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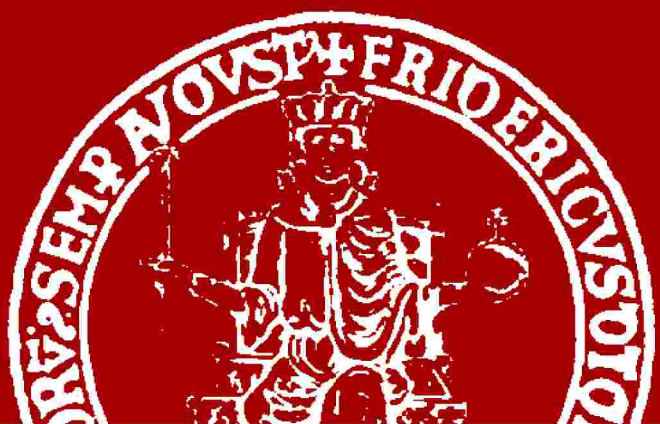

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New Green Deal: Towards Ecological and Human-centred Urban Development Strategies

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GENIUS LOCI: THE EVALUATION OF PLACES BETWEEN INSTRUMENTAL AND INTRINSIC VALUES

Luigi Fusco Girard, Marilena Vecco

Abstract

This paper aims to provide an analysis of cultural heritage, in both its tangible and intangible dimension, as an ecosystem. It discusses the theories of value underlining the need to overcome the traditional assessment approach based on instrumental values and to propose a new avenue to talk and assess cultural heritage, specifically focusing on its genius loci. Clearly, there is the need to take into account intrinsic values as well. How to improve the effectiveness of recovery, restoration and valorization interventions on cultural heritage and landscapes? The lens of ecology is here introduced in planning conservation. A complex notion of value of cultural heritage is proposed, which will imply specific consequences on evaluation processes. We propose such reflection on methods for valuation of cultural heritage and landscapes in an ecosystemic perspective to inform policy making and physical and spatial planning for sustainable management of cultural heritage and landscapes.

Keywords: genius loci, instrumental values, intrinsic values

GENIUS LOCI: LA VALUTAZIONE DEI LUOGHI TRA VALORI STRUMENTALI E VALORI INTRINSECI

Sommario

Il presente paper si propone di fornire un'analisi del patrimonio culturale, sia nella sua dimensione tangibile che in quella intangibile, come ecosistema. Vengono discusse le teorie di valore, sottolineando la necessità di superare il tradizionale approccio di valutazione basato sui valori strumentali e di proporre una nuova strada per "riflettere" e valutare il patrimonio culturale, concentrandosi in particolare sul suo genius loci. È evidente la necessità di tenere conto anche dei valori intrinseci. Come migliorare l'efficacia degli interventi di recupero, restauro e valorizzazione dei beni e dei paesaggi culturali? La lente dell'ecologia è qui introdotta nella pianificazione della conservazione. Si propone una nozione complessa di valore del patrimonio culturale, che implica conseguenze specifiche sui processi di valutazione. Si propone una riflessione sui metodi di valutazione del patrimonio culturale e dei paesaggi in una prospettiva ecosistemica per informare il processo decisionale e la pianificazione fisica e spaziale per una gestione sostenibile del patrimonio culturale e dei paesaggi.

Parole chiave: genius loci, valori strumentali, valori intrinseci

1. Introduction

Millennium Ecosystem Assessment (MA) published in 2005 with reference to cultural and amenity services underlines the ecosystemic approach characterizing the relationship between the human being dimension, expressed in human cultures, knowledge systems, religions, heritage values, social interactions and the linked amenity services. This relationship has been all the time impacted and shaped by the nature of the ecosystems and ecosystem conditions, on which culture relies. Meanwhile, human beings have always interacted with their environment with the aim to increase the availability of certain services and goods. In the MA perspective, it is artificial to separate these services and goods or their combined influence on human well-being (MA, 2005). There is a clear call to adopt a holistic and systemic approach when we are dealing with cultural heritage in its tangible and intangible dimension. To this end, there is the need to revisit and go beyond the traditional assessment methods of cultural heritage, to identify more innovative methods, which can capture the variety and multidimensionality of values embodied by the tangible and intangible cultural heritage.

The present paper its explorative in its nature. It aims at reviewing the existing approaches and propose a new avenue to talk and assess cultural heritage, specifically focusing on genius loci. The research question of the present paper reads as follows: How to improve the effectiveness of recovery, restoration and valorization interventions on cultural heritage and cultural landscapes? How to transform a cultural asset into a place, that is a living ecosystem, to be managed as a living organism?

The lens of ecology is here introduced in planning conservation. A complex notion of value of cultural heritage is proposed, which will imply specific consequences on evaluation processes.

The remainder of the paper is structured as follows. Section 2 presents the theoretical framework of the concept of value in its instrumental and intrinsic dimension, and of cultural heritage and cultural landscapes, including their genius loci, as ecosystems. Section 3 outlines the relationship between instrumental and intrinsic values while section 4 presents the circular dynamics of genius loci. Section 5 introduces an example of best practices to increase the efficiency of requalification interventions on cultural heritage and cultural landscapes applying the instrumental and intrinsic values relationship. Section 6 concludes by presenting a discussion on the main results and proposing some future research avenues.

2. Theoretical framework

2.1 Theories of values

The concept of value is central to economic analysis and may be regarded as the origin or reason for any kind of economic behavior. In economic thinking regarding the concept of value (Throsby, 2001), the starting point is Adam Smith's book *The Wealth of Nations* (1776)[1]. Smith was the first to introduce the distinction between the value of the use of an asset, or rather its capacity to satisfy one or more human needs, and the value of exchange,

[1] In this paper we consider only theories of values institutionalized within the economy discipline. However, in reality, an interesting role on the birth of the market economy had already been offered by the Franciscan Economic School in the Middle Ages (Bazzichi, 2015; Carbajo Nunez, 2014).

understood as the quantity of other goods and/or services that one is willing to offer to acquire a unit of the asset.

Following Smith and the political economists of the nineteenth century, the theories of value were based on the cost of production: the value of a good was the results of the costs of the input used for its production. Smith, followed by Ricardo and Marx developed theories of value, according to which the value of an asset was determined by the quantity of work it contained, or rather how much work was required for its production. According to Marx, any other factors of recompense (such as profits, interest, dividends, revenue) were a plus value compared to the work value. His value theory was a distribution theory characterized by the relations in a social field.

During the eighteenth and nineteenth century, the distinction between the actual value and the natural value of the goods established itself: whilst the former was the result of "contingent causes" the second was determined by the production costs of the individual goods (Petty, 1662). One value that was correlated to the latter was the intrinsic or absolute value; this was a sort of number or measure that could be attributed to a unit of an object regardless of an exchange and that had to remain unchanged in time and space.

Smith's definition of intrinsic value is based on the labor theory. Ricardo goes back to this theory, distinguishing between absolute and relative values. The idea that absolute and natural ideas exist, Malthus also by shared, was criticized by Samuel Bailey and other theoreticians who denied the existence of such values for goods. Ruskin himself was highly critical of the classic theory of value: Inspired by Carlyle, the idea that the value of an asset/good could be determined by the market processes and monetized was a violation of the principles of the intrinsic value, according to which the value of objects can be established in advance. It establishes a connection between the value and work, characterized by the skill of the worker who produces the object to improve his efforts during his life.

At the end of the nineteenth century, the marginalists (Jevons, Menger and Walras) replaced the production cost theories with an economic behavior model based on individual utility. According to the marginalists, individuals and their preferences comprised the last phase in the exchange and market process. The value was explained in terms of consumer's preferences for goods that could satisfy their needs. The utility theory represents the foundation of the consumer behavior theory: individuals have preferences that are ordered according to levels, and the marginal utility gradually decreases as the good consumption increases.

Since the value is a constructed phenomenon in a society, one must bear in mind that its determination and therefore also that of the market values cannot be isolated from the social context in which these processes take place. Veblen and Commons developed the social value theory, attacking the foundations of the marginalist theory of value, or rather, that consumers could formulate ordered preferences based on their needs alone, without being influenced by the institutional context, interactions and the social processes that regulate exchange.

There is a vast number of different types of values and the interactions between them can be highly complex. Any description of the values related to cultural heritage comes up against difficulties of both a conceptual and practical nature that hide the diverse expressions of the values of heritage (cultural, economic, social dimension, etc.). These are expressions of the same qualities recognized in heritage but seen from different perspectives, and incomparable with one another (Mason, 2008; Vecco, 2007). Furthermore, one must also accept that these values are relative and change in time and space. Values do not exist in themselves, but they

are culturally and historically constructed. As Gibson and Pendlebury (2006) pointed out: "[…] value is not an intrinsic but rather the fabric, object or environment in the bearer of an externally imposed culturally and historically specific meaning, that attracts a value status depending on the dominant frameworks f value of the time and place" (p. 1).
The creation of a value typology could facilitate the understanding of the different evaluation processes that are involved in the preservation process of heritage while, at a later stage, allowing a comparative evaluation of the diverse heritage projects (Vecco, 2019).
The different categories of values correspond to the different discipline positions of the stakeholders involved in the process of the decision-taking, organization and conservation of cultural heritage. These different ways of assessing heritage result in different approaches to conservation.
If one studies the key systems in literature of values in reference to heritage (Vecco, 2019), one can observe that the object being described remains the same while basically the way, approach and at times the descriptive levels change.
It must be pointed out that several authors, for example Randall (1987) or Allison *et al.* (1996), Navrud, Ready (2002) only analyzed the purely economic values of the heritage. On the other hand, in the Burra Charter the economic values are minimized as they are either regarded as derivations of cultural and historic values, or simply from a historic and artistic perspective (Riegl) or the focus is shifted to the social benefits of restoring cultural heritage (Del Saz Salazar and Marques, 2005) or to the sustainable development of this cultural heritage (Licciardi and Amirtahmasebi, 2012).
Later, a classification of the values founded on the distinction between the economic and cultural fields was put forward as it is these dimensions that are considered a semiotic asset of cultural heritage (Barrère and Santagata, 1999). Similarly, one must bear in mind that owing to the existence of cultural values and the fact that these goods produce external effects (that usually lead to the market collapsing), the exchange of cultural goods on the market is problematic.
It should be observed that another two categories of values were introduced (Tab.1): the values of communication, which have a cultural matrix, and the ecosystemic values[2].

Tab. 1 – The typology of values

<table>
<tr><th>Cultural Values</th><th>Economic values</th><th>Communication values</th><th>Ecosystemic values</th></tr>
<tr><td>Historical</td><td rowspan="2">Usage
- direct
- indirect</td><td rowspan="2">Symbolic</td><td rowspan="3">of diversity</td></tr>
<tr><td>Social</td></tr>
<tr><td>Artistic</td><td>of option</td></tr>
<tr><td>Aesthetic</td><td rowspan="2">- of non-use
- of existence</td><td>of information</td></tr>
<tr><td>Moral</td><td>of recreation</td><td>of durability</td></tr>
</table>

[2] Carter and Brambley (2002) discussed the characteristics and physical and biological values, abstracting one can talk of ecological values.

Scientific	- of bequest	of community/ national identity	of integrity
Cultural		Use as knowledge capital	of uniqueness
Spiritual/religious	Intrinsic		of unreplacability
Educational			of authenticity

Source: Vecco (2007), p. 78.

Given the importance they have acquired in our society since they are an expression of the interest of other stakeholders, it was decided they should be treated as independent categories. In particular, the ecological values that play a role in the definition of the sustainability of cultural heritage can play an important role in conservation decisions and, at times, may actually be in conflict with the economic field. This classification proposes values that are most often referred to heritage, but it is important to point out that each cultural heritage asset does not necessarily have all the values mentioned above. These four categories of values represent different ways of defining the heritage; what changes is the conceptual context and the methodology used for its expression.

2.2. The economic values

The use value is the value derived from the possible commercial use of the resource, whether present or future. The use values of a constructed heritage asset refer to the goods and services that are derived from its use. Since these goods/services can be exchanged easily on the market, it is easy to give them a price. The non-use value expresses the value linked to the pure and simple existence of a heritage asset. Its existence is known, but it is not used.

The option value is not easy to express in terms of price since it is an economic value that cannot be exchanged on the market. It represents the value it has been given by an individual (that does not benefit from cultural or heritage activities), derived from the possibility (the option) of consuming the heritage asset in the near or distant future, if so desired.

Some of the values we have just classified as cultural values are also non-use values. The values of use usually belong to the category of economic values since individuals are willing to pay to acquire or protect them. The non-use value is usually classified in sub-categories, with the aim of highlighting the characteristic that could motivate the economic decision to conserve the heritage:

- *the existence value.* The heritage asset is evaluated for its existence: This is the value that individuals give to a site/heritage asset based on their knowledge of it, even if it is not consumed or if they have not yet decided to visit it;
- *the bequest value.* It expresses the desire to make the heritage asset available to future generations. This value represents the protection of future generations' rights, for whom one must guarantee the possibility of "consuming" heritage assets and services.

This approach can only stand if one assumes that the conservation of cultural heritage is a value that is felt by all generations and does not change over time; likewise, in conditions of uncertainty, the present generation decides their own options, between conservation and the other uses of cultural heritage, are less important than the possibility of the option transmitted

to future generations. If these two suppositions are removed, conservation could paradoxically be a cost for the current generation that sacrifices alternative uses of public resources, as it deems preferable, without producing the expected benefits for future generations.

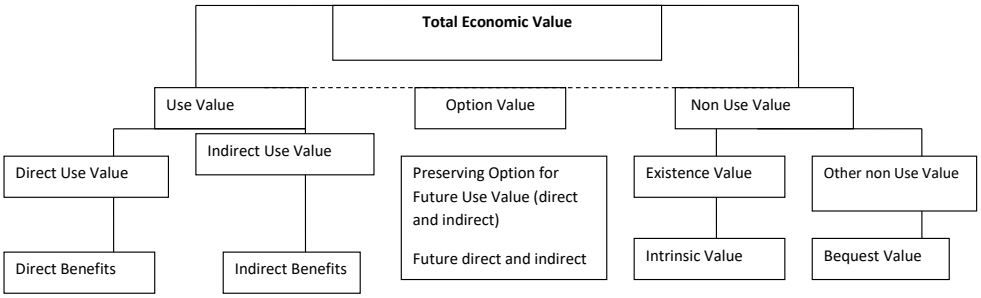
The principle of intragenerational equity has been discussed in terms of the influence of public policy (Baer and Snickars, 2001), economic valuation of heritage (Throsby, 2002) and sustainability (Cassar, 2003). Throsby (2002, p.107) defines it as follows: "The intragenerational equity dilemma is a classic inter-temporal allocation problem – that is, a choice between present and future consumption." Both present and future consumption entail costs with respect to preservation and maintenance, but is it possible to define the first or second-best option within this scenario? The point is to decide how far the principle of intragenerational equity, and its authority should be applied, and what the impact is on the present generation exactly. As Taylor (2013) points out, the problem that arises in any intragenerational consideration is whether an action or resource will be valued in the future. Is it possible to understand the needs of future generations that are not concurrent with our own? And should we accept that intergenerational equity should be limited by the intragenerational one?

2.3. The Total economic value of cultural heritage and cultural landscapes

The economic evaluation of the assets and services is a science that is in continuous evolution. For certain goods, such as a kilo of apples or a liter of petrol, the market fixes the price that expresses their economic value. This operation of determining the price of the good on the market is not possible for other categories of assets since this price, if it existed, would only be a partial expression of their total value.

As far as the evaluation of cultural heritage is concerned, the same approach could be used as for natural heritage, recognizing its Total Economic Value (TEV) (Fig. 1). TEV is divided into use value (Uv) and non-use value (Nuv). The use value, which regards the effective use of the resource, can be divided into the direct use value (Duv), the indirect use value (IuV) and the option value (Ov). The non-use values are the bequest value (Bv) and the existence value (Ev). The bequest value reflects the benefit derived from the knowledge that other people may benefit from the same resource in the future while the existence value studies the benefit derived from the awareness that a resource is protected. According to Fusco Girard (1994), the TEV still represents an anthropocentric approach, which is less bio-eco-centric. In other words, the TEV concerns to the individual availability to pay, excluding all subjects who do not have it, including future generations as well as marginalized and poor people.

Fig. 1 – The Total Economic Value (TEV)



Source: adapted from Serageldin I. (1999). Very Special Places: The Architecture and Economics of Intervening in Historic Cities, Washington DC, The World Bank, and Powell N., Willis K. (1996). Benefits received by Visitors to Heritage Sites: A Case Study of Wirksworth Castle. Leisure Studies, n. 15, p. 27.

The TEV can be expressed by the following equation:

$$\mathbf{TEV} = Uv + Nuv = (Duv + Iuv + Ov) + (Bv + Ev) \quad (1)$$

The TEV is based on the idea that every asset and service is made up of different attributes: some are easy to assess, others less so. Techniques from environmental economics are used to quantify these attributes: the Contingent Valuation Method, the Hedonic Price Method, the Travel Cost Method and the Petition Method[3]. According to Pagiola (1996), the TEV is founded on two main categories: the use value and the non-use value; the option value is somewhere between the two.

The use value (Fig. 1) can be either indirect or direct. The latter is differentiated into the extractive use value and non-extractive use value (Serageldin, 1999). The extractive use values of an asset are the values that can be derived from a site; Serageldin gives the example of a historic city in which a direct use is made of the buildings such as the houses or commercial premises. On the other hand, the non-extractive use values are derived from the heritage site services. If we go back to the previous example of the historic city, people can only walk through it and enjoy it, without paying any price; their use of the city is not determined by any economic or financial transaction. Measuring the non-extractive use value is a much more complicated operation than that of determining the mobile use value.

In the category of the non-extractive use values (Pagiola, 1996) the most important are the aesthetic and recreational values. The indirect use value concerns benefits that an asset may create "unconsciously". For example, the restoration of a monumental complex may improve the quality of life in the district where it is located.

[3] For more detail about these methods see Snowball (2013).

The option value is linked to the willingness to pay for future use, even if not clearly defined from a temporal perspective. For an individual, this benefit is comparable to an "insurance premium" that they are willing to pay to ensure they will have the asset at their disposal in the future. The idea of the existence of an option asset goes back to Weisbrod who, in 1964, suggested the existence of a use value that was unrelated to the number of actual visits made. In 1967, referring to Weisbrod's idea, Krutilla and Fisher focused on the idea of a willingness to pay that was unrelated to the use of the resource but instead, to its simple existence (existence value) or the possibility to guarantee its consumption for future generations (bequest value). Walsh R. G., Mckean J. R. (1998) have claimed that willingness exists to pay for the anticipation of visiting a specific site as well. This value (Av) expresses the benefit to certain subjects from the anticipation of the visit by purchasing an informative CD-rom, thematic maps or books and magazines.
According to Fusco Girard (1994) and Fusco Girard and Nijkamp (2009), the TEV still represents an anthropocentric approach that is slightly bio-eco-centric, in the sense that the TEV refers to individual willingness to pay, excluding all those who do not have this willingness: first and foremost, future generations, followed by the more marginalized subjects such as the poor, the natural environment, etc.
The expression of the TEV can therefore be written as follows:

$$\mathbf{TEV} = Uv + Nuv + Av = (Duv + Iuv + Ov) + (Bv + Ev) + Av \quad (2)$$

The problem is understanding whether the TEV makes it possible to "capture" the entire economic value of an asset. According to Margolis (1982) and Etzioni (2010) the individual has two sources of value: the utility and ethics that are expressed via participation in the *polis*. On the one hand, the subject acts according to their interests and personal profit (they are the real "consumers"); on the other, they seek solutions that can also benefit the others. According to Page (1992), the evaluation of the social foundations, linked to individual behavior, is of great importance because it is aimed at satisfying not only consumption needs but also social and relational needs.
As early as 1996 Turner *et al*., had already spoken of *glue value* as all the values that are not "captured" by the TEV. According to Turner, the autopoïetic system has a primary value because it is the primary foundation that allows the system to distribute services and functions that are useful to people. This is the value of the latent functions underlying the ones that are usually appreciated and they express the system value as a whole. This primary value underlies the heteropoïetical activities that define the total secondary value (TSV). The premise for the distinction between use and non-use values is the existence of an ecosystem that is in good condition and from this perspective they represent secondary values. The TEV includes the differences that make up the total secondary value (Fusco Girard, 1995), but not the primary value of the aggregate system.
It is only this total secondary value that can be defined in monetary terms through the total economic value (TEV). A total value (TV) is recognized in an ecosystem and is represented as follows:

$$TV = (TEV, i) \quad (3)$$

where *i* represents the intrinsic value. The total value is only annulled if this value equals zero; but if *i* is different to zero, one gets:

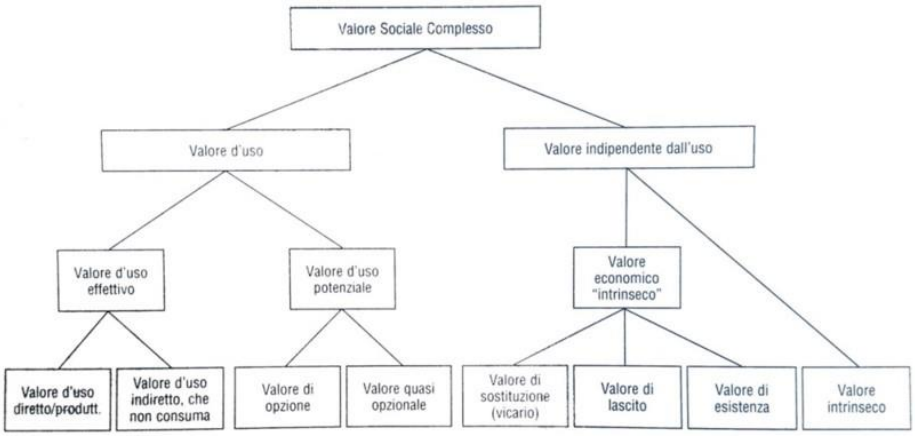
$$TV = (TEV, i) > 0 \quad (4)$$

The TEV is unable to express the global value; it has two limits. The first regards the difficulty in expressing all assets and services in economic terms, the second the structural impossibility of expressing the intrinsic value *i* in monetary terms.
Similarly, Fusco Girard (1995) and Fusco Girard and Nijkamp (2009) proposed the concept of complex social value (CSV), or rather, a broader value than the TEV:

$$CSV = (TEV, I) \quad (5)$$

Where *I* indicates the intrinsic value of the good/resource.
In the case of cultural heritage, this value can be estimated using procedures of a multicriterial nature that refer to quantitative-qualitative indicators: "the cultural/historic/monumental capital of a city is an element that contributes, albeit indirectly, to the stability and resilience of an urban ecosystem and that, as such, has an intrinsic value (*I*) in the measure in which it contributes to the production of social capital, or rather the "glue" that makes it possible to unite all the subjects of a community, reflecting common history, a whole of common knowledge, creativity and values" (Fusco Girard and Nijkamp, 2004, p.116).
The complex social value reflects a conception that is based on the individual's centrality, without separating them from the community or ecological context, this is an ecological-community conception of the person (Fig. 2). It has nothing to do with either the bio-ecocentric culture or anthropocentric-economic culture but only with the value of existence.

Fig. 2 - The Complex Social Value (CSV) of Cultural Capital



Source: Fusco Girard L., Nijkamp P. (1997), p. 122.

The complex social value reunites the economic and extra-economic evaluations. It makes it possible to preserve the multitude of agents interested in a resource: direct users, indirect users, potential and future users. It expresses the value for future generations in terms of potential value. In fact, future generations are not interested in the value that a use for demand might generate but in the intrinsic value that is independent of the use value. As a result, the criterion for the choice and economic calculation for each conservation project has to be rewritten as follows:

$$V_{present}\,(B_{conserv.(D,I,P,FU)} - C_{conserv.(D,I,P,FU)}) - V_{present}\,(B_{transf(D,I,P,FU)} - C_{trasf(D,I,P,FU)}) > 0 \qquad (6)$$

Where D, I, P, FU indicate the value of the benefits (B) and costs (C) linked to the conservation of transformation of the heritage for the direct, indirect, potential and future users.
In this fashion, it is possible to take the decision into account over a long period, and the relationships between the different users and the qualitative or intrinsic values. The intrinsic values that the future generations are also interested in integrating the economic approach of the use values, making an overall evaluation possible from a social perspective.
According to Fusco Girard (2004) and Fusco Girard and Nijkamp (2009), the decision to transform or conserve a monumental site has to be founded on a comparison between the monetary benefits of the transformation ($B_{transf.} - C_{transf.}$) and the complex social value of the area. Only in those cases in which the net benefits are generally superior to the complex social value CSV of the zone or site (see Fig. 2), may the transformation take place:

$$V_{present}\,(B_{trasf.} - C_{transf.}) > CSV \qquad (7)$$

where CSV = (TEV, I)

TEV is the total value in monetary terms,
I is the intrinsic value in non-monetary terms deduced from the information regarding the role of the resources in the social system
> means generally superior so as to make it preferable.

2.1. The concept of ecosystem

A common element of cultural heritage and cultural landscape is of being an ecosystem. The notion of ecosystem was introduced by Odum (1953) as a dynamic, complex and interactive system composed by living and not living components, which are connected in a set of multiple dynamic interdependences. The ecosystem's existence is based on the following principles:

- *principle of interdependence*: all members of an ecological community are connected in a vast and complex network of relationships. They derive their essential properties and, indeed, their very existence from their relations with other members;
- *principle of cooperation or partnership*: the cyclical exchange of energies and resources in an ecosystem are sustained by general cooperation. The tendency is to associate, forge, and live one amongst the other or attached to the other;
- *principle of flexibility*: the flexibility of an ecosystem is a consequence of its multiple feedback loops that, due to evolving environmental conditions, tends to restore the system to equilibrium when deviated from its norm; and

– *principle of diversity*: in an ecosystem, the complexity of the network is a result of its biodiversity. A diversified ecological community contains many species whose ecological functions overlap and complement each other so that it remains elastic, resilient, resistant and adaptable to disruptions.

Seen through the lens of an ecosystem, we can affirm that cultural heritage and cultural landscapes are to be interpreted as autopoietic system (Iba, 2010; Luhmann, 2003; Varela *et al.*, 1974; Zeleny, 1980; Odum, 1953) or unit, whose organization is distinguished by a particular network of production processes. It constantly redefines itself and sustains and reproduces within itself. Moreover, it is a system in which each component is conceived to participate in the production or transformation of other components found within a multi-dimensional network, which, based on its geographical, historical, cultural, economic and social coherence, establishes its distinction, uniqueness and significance of cultural heritage and cultural landscapes.

In this way, cultural heritage and cultural landscapes, understood as an ecosystem, perpetually builds themselves, produce their components and in turn the products. This reproduction has firstly its objective in resilience both in time and space. Resilience is to be understood as the capacity of a system to absorb disturbance and reorganize itself according to social systems (Walker *et al*., 2004). Secondly, reproduction also has its objective in the innovation and evolution of a place. As Holling (1973) pointed out, resilience - besides this capacity of absorbing shocks and maintaining functions - also includes a second aspect concerning the capacity for renewal, reorganization and development, to be taken into consideration when redesigning a sustainable future. Thanks to its resilience, cultural heritage and cultural landscapes regenerate themselves with new significance to reinforce their importance and specificity, therefore their specific genius loci.

The holistic approach implies that the whole is more than the sum of its parts. The holistic also expresses a relationship between these parts: each element receives significance only because of its position and relationship with the surrounding elements. Consequently, changing the position or the relationship of one element will imply a change in the system as a whole. This has been clearly demonstrated by Antrop (2000), who applied the holistic approach to landscapes. By extending it to places, we can identify the same relevant structural consequences: i) the relativity of the element value: the value of an element is not absolute; ii) changing the element also changes the whole; and iii) changing the context can imply a change of the quality of this included element.

According to this approach, the place understood as an ecosystem continually builds itself, being produced by its components and producing them in turn. This reproduction is aimed at permanence in time and space (resilience) but also the innovation and evolution of the place. As the place is regenerated and enriched with new meanings, its resilience, specificity and significance are further reinforced.

3. Relationship between instrumental and intrinsic values

In Ecology, the notion of intrinsic value is due to the recognition of a value, which is independent from the use by human beings, because this value “pre- exists” to their presence (Naess, 1984). It means, on the one hand, to recognize that the phenomenon of value does not arise only from the relationships between a resource and the human beings. In other terms, the value is not something exclusively subjective, based on the dynamic relationship between human beings and nature, or between a subject and an object/resource. It is a notion of value

that "exists in itself", regardless of the utility for the human being, and therefore from aims and intentions of men. It is an "objective" value, which exists before the presence of man (Naess,1985).

In the case of cultural heritage and cultural landscapes, it is not possible to strictly consider an "intrinsic value" related to the bio-ecological vitality of the natural ecosystem, which is related to the capacity to maintain its stability, its resilience over time as well as its autopoietic capacity.

Nevertheless, the notion of the intrinsic value can be extended - within certain limits - also to cultural/monumental resources/heritage, for which the instrumental values are able to express only some components of value (and not all values). Specifically, the "intrinsic" value for cultural heritage and cultural landscapes can be justified considering these argumentations, also if the cultural assets are not a capital characterized by a bio-ecological vitality in the strict sense.

Historically, the intrinsic value of the cultural heritage can be traced back to the sense/significance that the culture of sacred/religious places recognizes to certain sites (in which architectural artefacts can also be located). For example, in the Hindu religion a spirit of places is associated which "lives" in nature, and which represents the foundation of its intrinsic value (Framarin, 2010). In Buddhism there is a reference to the intrinsic value of nature (Standford Encyclopedia, 2017), while in Taoism it is recognized that the economy of man is but one aspect of the more general economy to nature. Furthermore, in the Shinto Japanese tradition, nature is associated with a value in itself, as a spirit that lives in it.

More recently, Hargrove (1992) recognized for natural resources both an intrinsic non-anthropocentric value (i.e. a value that a natural resource possesses regardless of the evaluation of an evaluator) and an intrinsic anthropocentric value, identified by man/community.

The intrinsic value referred to cultural heritage arises from an evolutionary process over a long time, therefore similar to what happens in ecosystems: it refers to what has been preserved as a permanence in the continuous dynamics of the city/territory as the result of the recognition of value (in the long run) from the people.

Heritage assets are *order structure* for the city development, which WERE able to orient the city growth towards a specific direction in its history. However, it is an intrinsic value that differs from that of natural ecosystems because it has been produced/created/ recognized by men over a very long history. In a certain sense, we can speak of "subjective" intrinsic value (Callicott, 1985; Elliot, 1992) and not objective, because it is a value recognized or created by certain subjects through their capacity for critical discernment. Therefore, it does not exist in itself, that is, independently of the subjects who have recognized it and recognize it as such, for its uniqueness, specificity, irreproducibility, beauty, and meaning (even spiritual).

Now, this subjective intrinsic value does not require a bio-centric or eco-centric vision/approach. It remains anchored to the anthropocentric approach. Therefore, the useless dichotomy between anthropocentric values and eco-bio-centric values disappears. The intrinsic value is configured as compatible with a relational type approach, that is interpersonal, community, collective because it is recognized from generation to generation. While the instrumental value can be in some ways compensated, so that a loss does not ultimately occur, the intrinsic value is not substitutable or replaceable or compensable (Callicott and Palmer, 2005). From the irreproducibility that is connected to the non-substitutability and in turn to the authenticity/integrity and the exceptionality, that

characterize the artistic production, derives a particular value assimilable to a value independent from use. A value that every (and also future) generations can recognize during future time as time-less/eternal. Certainly, values are socially constructed. They are dynamic in time and in the space. But for cultural heritage it can be recognized a value that tends, at some limits, to be recognized during the long (or without end) time, from one generation to other generations.

The use values for future-generation users can express these characteristics. *Future generations* have the right to dispose of this cultural capital, even if at the present time it is devoid of any demand for use, that is even if the use value is currently nil. It is this "essential" value, that is independent from any use, that characterizes and differentiates this cultural man-made capital from other man-made assets, capable of generating a similar activity (economic/ financial flows as a supermarket etc.). This value that goes above and beyond all other extractive and not extractive values can be interpreted as an "intrinsic value".

This "intrinsic value" can be understood/interpreted in a sense, more directly linked to the autopoietic approach. Its vitality is represented by the way in which its presence and use influences the stability of the context and its resilience. In fact, they interact with the living components of the socio-economic-urban ecosystem, that is, with the past, present and future community. The intrinsic value is the essential significance/capacity of an asset/space/site which was (and should be) able to remain in the urban system as a permanence in the continuous dynamic changing context: which is recognized from one generation to another one. But also had the energy to give a direction to the city or the site development, as a telos of the living systems (Faber *et al*., 1995).

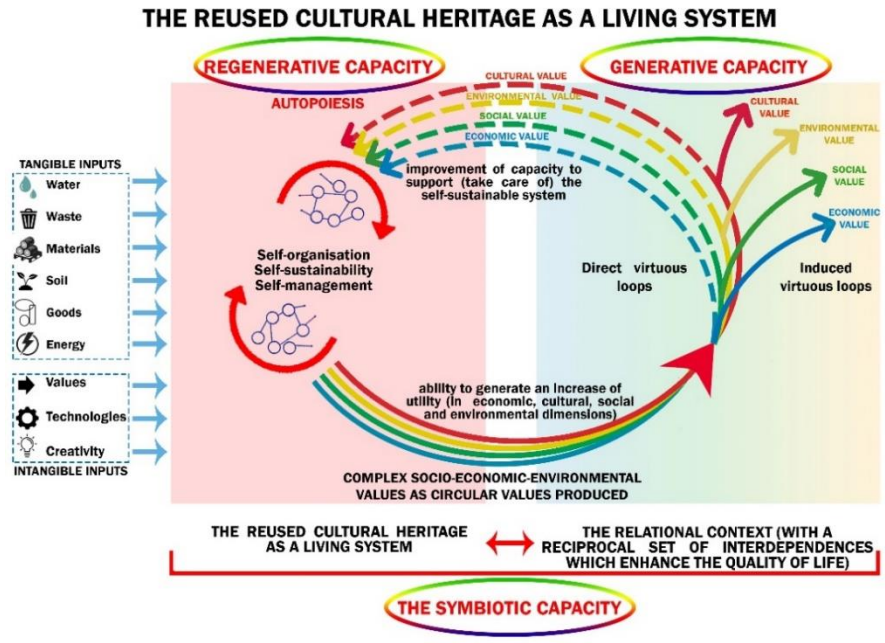
In short, just as every organism has its own *telos*, a fundamental purpose that characterizes it, and that orients it towards a certain direction instead of another, so that some components of the urban cultural heritage have offered a direction of development throughout history. This ability represents the intrinsic value of cultural heritage. The vitality of the heritage assets depends on their ability to adapt themselves to the often-tumultuous change, due to external pressures, and at the same time to maintain the permanence of some elements that characterize its specificity, identity.

Cultural assets have had the capacity to bring together and to be elements of social stability. The "intrinsic value", reflecting the specific, unique, irreproducible character and meanings/significance/identity and beauty of a place, determines a sense of "connection" between different subjects and between community and manmade capital (monuments). There is a "circular" relationship among them.

Cultural heritage is the element in which a community can recognize itself today and in the future. They are a source of local identity, integration, cohesion, community awareness, shared common values, specificity towards a homologating culture conveyed by mass-media technologies. Cultural heritage "tells us" where we come from; it gives us a homeland without which we would be lost stateless persons; it helps us to recognize our roots, our identity. Cultural heritage is a relational element of reference, an "anchor" in a period of rapid transformation, in which the identity of a community, its memory, its genetic heritage, are expressed as well as representing the instrument with which each generation communicates with all the others. This intrinsic value is interpreted as the essential significance/meaning, able to conserve itself in a continuous regenerative process. In the same time, it generates other use values, in a changing context. For example, the role of some religious cultural heritage, around which a specific and unrepeatable identity is built, a common feeling that

cannot be confused with the social and/or environmental or economic value of touristic fruition. The "intrinsic value" is the essential meaning of these heritage assets, the spiritual value, which represents the ground for other values as it has shaped the built asset/spaces and contributes to its regeneration with other social, cultural, symbolic, art ones, etc. This "intrinsic value" attributes to the cultural heritage its authentic vitality during the time and also its capacity to support the development and accumulation of multiple relationships.
In conclusion, heritage assets express a *unitive capacity* for activities and human beings: a complementarity and reciprocity structure, as it happens in the natural ecosystems, where there is a specific attractive capacity, which involves different components. They contribute to attract people and thus to generate/re-generate a heritage community. In this perspective, its capacity is assonant to the intrinsic value of the natural ecosystems: they have a unitive capacity, a "glue" capacity, able to stimulate reciprocity and complementarity in the behaviors/actions. Thus, it is possible to transfer the notion of intrinsic value from ecosystem heritage also to cultural heritage: to "places". The intrinsic value becomes the "spirit of places" (Norberg-Schulz, 1980). The intrinsic value certainly expresses the "spirit of places" being connected to the permanence of tangible and intangible elements over the long time and to cooperative behavior. The set of instrumental anthropocentric values and intrinsic values represents the overall systemic value of a cultural site.
The following diagram (Fig. 3) outlines the intrinsic values linked to the autopoietic capacity of a place, which can generate other multidimensional values and impacts, in a symbiotic relationship with its surrounding landscape.

Fig. 3 – Variety of values linked to the autopoietic capacity of a place



Source: Fusco Girard (2019), CLIC Project Workshop, London, 2019.

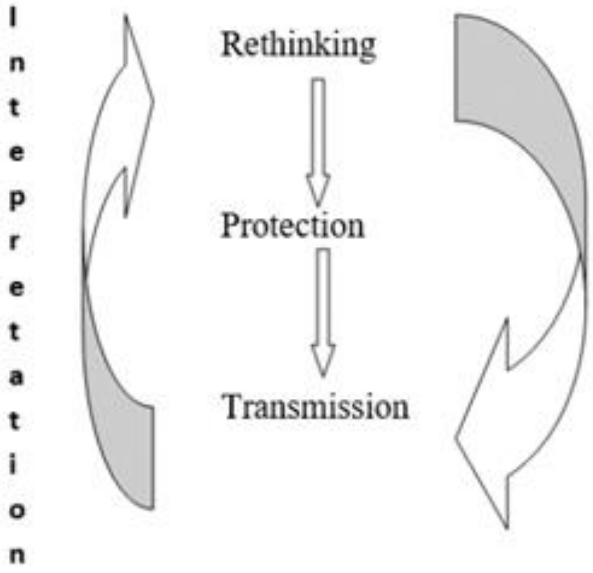
In short, intrinsic value becomes a further tool as well as an argument for its conservation in economic development plans, in urban projects as well in urban/territorial regeneration strategies, because it becomes something inherent to places, their "status", the landscape and how this deserves respect, care, attention and appreciation. Intrinsic value offers a criterion in the choice between new functions: a direction for guaranteeing the coherence between the essential meaning of an asset and its new use values.
Basically, by recognizing both instrumental and intrinsic value to certain goods/resources, conservation/care can be better justified with respect to a purely economic/instrumental or only historical/cultural/aesthetic approach. However, situations may arise in which intrinsic and instrumental values diverge dramatically. For example, a very marginal ecosystem from a territorial and economic point of view has only an intrinsic value, but it has no instrumental value and vice versa.
Furthermore, it may happen that the instrumental value and the intrinsic value are compared with each other. The intrinsic value can then be sacrificed over the instrumental value, or vice versa. This is not a technical decision, but reflects the culture, the worldview, the priorities of a community/society. It may deem some costs intolerable/unacceptable from a certain threshold onwards.
Whether in relation to tangible or intangible forms in cultural heritage and cultural landscapes, genius loci creates an environmental character via an overall atmosphere and then leads the relationship between this and the community. cultural heritage and cultural landscapes are the result of the relationship between life, physical space, people and creative expression. They are a generator of creativity. They are specific areas of identity and social relationships. They are founded on relationships of utility, convenience and social and emotional paradigms, and are affected by strong relationships existing among independences of use values, instrumental values and market values. Indeed, places are spaces characterized by extraordinary diversity (among forms, typologies, morphologies, cultures, traditions, etc.).

4. The circular dynamics of the spirit of place

The spirit of a place constructs tangible characteristics, at the same time as the physical place affects and structures the spirit. Places are influenced by different social actors, in terms of realizers and users who actively participate in the construction of their meanings. Considered in its relational dynamics, the spirit of the place assumes a multidimensional and polyvalent character, possessing numerous and different meanings. It is a dynamic approach that allows us to grasp the possible diversity and variety characterizing the spirit of a place.
The notion of genius loci helps us to better understand the living and permanent character of monuments, sites, cultural landscapes, and of places in general. It provides a richer and more dynamic vision of the concept of place, in both its tangible and intangible dimensions. The spirit of places does not exist in itself: rather, it is a human construction that satisfies social, cultural and religious needs. As Norberg-Schulz observes: "The structure of a place is not a fixed, eternal condition: as a rule, places change, and sometimes even rapidly. This does not mean, however, that the genius loci must necessarily change or be lost. [...] The stabilitatis loci is a necessary condition for human life. [...] Protecting and conserving the genius loci means concretizing its essence in ever-new historical contexts. Respecting the genius loci does not mean copying ancient models but highlighting the identity of the place and interpreting it in a new way. Only in this way can we speak of a living tradition that justifies the changes referring to a series of local parameters" (Norberg-Schulz, 1980, p. 182).

To keep and to valorize the spirit of place we need to accomplish three main steps: rethink, protect and transmit the place and its spirit (Fig. 4). This threefold movement is not linear. To be successful it needs to be circular and incremental:

Fig. 4 – The threefold circular movement of the maintenance and valorization of the spirit of place



Source: Vecco (2019), p. 5.

To take care of a place and its genius loci, it is necessary to know how to see and recognize them; furthermore, we need to know how to interpret its values. The care and reconstruction of places in sustainable forms therefore require active, conscious citizenship, capable of combining contextual knowledge with expert knowledge through forms of participatory democracy. Local self-sustainable development, based on the recognition and enhancement of the identity of places (Arjomand Kermani *et al.*, 2016), must first of all be led and developed by local society.

Preserving the genius loci as the cultural and architectural identity of a place, ensuring its permanence in the collective memory and transmissibility over time, means fully understanding the functional, typological, stylistic and constructive reasons from which a place originates. Historical-environmental factors traditionally guide the human project in any context, outlining a precise typological, constructive and formal repertoire, in which it is possible to trace some of the most recurring elements of identification.

Transmission is a condition sine qua non of protection because if the spirit of the place is not transmitted, it may disappear with the place that characterized it. Transmission is a delicate operation involving the presence of mediators who consciously or unconsciously transform the spirit of the place to better conserve and appropriate it. In this way, the spirit of the place undergoes a process of transformation in resilience, which allows a place to be renewed and to continue to exist amidst renewal and change (see Fig. 4). Thanks to these re-appropriations and environmental, social and cultural re-contextualizations, often expressed through immaterial practices, a place may, in turn, produce new meaning (spirit) and social configurations. The spirit of a place is transmitted through interpretation, without which no transmission process is possible.

The concept of authenticity is essential to the spirit of place. McKercher and Cros (2002) write that "intangible heritage management principles suggest that the integrity of the cultural place plays an important role in presenting an authentic experience" (p. 18). Later, Loh (2007) states that the spirit of a place comes alive in the ways of the community and to serve the needs of the local community.

5. Beyond traditional evaluating methods

It must be recognized that the value connected to intangibles, emotions, local culture, cultural memory, etc. cannot be resolved on the basis of the Willingness to Pay (WTP). Different procedures are required, based on an approach that also considers intrinsic values. These can be evaluated through evaluation processes of a completely different nature: through participatory evaluation processes.

Through participatory valuations, an estimate of intrinsic value can be constructed in a consensual manner.

The evaluations elaborated on the basis of a utilitarian/anthropocentric approach, i.e. on the instrumental value of goods and services, i.e. on their economic value, of use and also of non-use) are resolved through a multiplicity of evaluation procedures based on the willingness to pay. But since intangible, cultural, philosophical, symbolic, spiritual, religious values are also involved, which can escape an evaluation based on the WTP, it is necessary to integrate these evaluations with a non-utilitarian approach.

The integration of the approach based on instrumental values and intrinsic value improves choices of the reuse/restoration/requalification interventions of cultural heritage. Specifically, the Complex Social Value (CSV) expresses the above integration. Therefore, the evaluation of the intrinsic value of cultural heritage is the result of a social evaluation to express a complex value.

The approach based on instrumental values and on intrinsic values obviously requires two different metrics: the first are linked to the economy, the second to the cultural dimension. The effective promotion of human flourishing follows from an integration of the two.

Policy Labs are an increasingly used example of tool in making decisions. They are platforms to produce and to share new knowledge. But also, to improve trust and thus cooperation, being trust the unifying capacity like the attractive capacity in the natural ecosystems, which guarantees resilience (Genovesi, 1765). They assume as a general objective the fight against poverty, social malaise, environmental degradation, respect for human rights, etc., starting from the analysis of specific contexts as a starting point for hypotheses of transformation that involve the various public, third sector and private subjects, verifying the results. Processes of co-creation, co-design, co-planning are stimulated by exchanging skills and experiences

and so, based on a hybrid approach that combines deductive with inductive approaches, based on good practices.

Evaluation processes, or rather co-evaluation processes, are introduced because citizens are involved as active users and not as passive spectators, capable of proposing new ideas and hypotheses for solving specific problems. The assessments are particularly applied to prototypes and include not only short-term impacts but also medium and long-term ones. The general objective is to improve choices, that is, such as to bring about a positive transformation.

Evaluations are indeed assuming over time a central role in Policy Labs, as a tool that helps to identify solutions worthy of funding because they can improve people's living conditions, contributing to their sustainability and resilience. The above is evident when the evaluator belongs to the third sector, between the state and the market. The assessment cannot be concluded with the economic instrument of willingness to pay but requires other processes. For example, it requires processes of a deliberative type (McGann *et al*., 2018), being interpreted as a process of construction of values not already given, but precisely built, on the basis of shared knowledge. These procedures refer to the participatory processes of deliberative democracy, founded on the public debate of the good reasons that are opposed to other good reasons, making the stronger ones win. The result is characterized by the achievement of a satisfactory level of consensus.

This evaluation must be elaborated on the basis of a social and cultural perspectives, that is linked to the local culture, to the vision of the world, to the symbolic, spiritual, intangible values of people and not only to the expert knowledge of the technicians. And the WTP is by no means sufficient for these evaluations. Non-economic valuations, based on non-utilitarian approaches, are evolving and still require research to help improve decision-making processes. They are based on communicative/participatory/deliberative processes and not on the aggregation of subjective preferences.

On the other hand, intrinsic value is a systemic/holistic value: that is, it incorporates all the complementarities and interdependencies/interactions between the different components. Its most consistent evaluation scale is the ordinal one (and not the cardinal one). In reality, this approach also serves to integrate the evaluations elaborated by the specialists, who mainly use quantitative metrics: they serve to introduce qualitative evaluations, which are those that mostly the various stakeholders promote/use. This qualitative metric mostly refers to subjective indicators of perception relating to possible variations in the state of well-being perceived before and after transformation.

These qualitative assessments should be characterized by a level of consensus that is as high as possible in the different contexts, so that they can be satisfactory, and therefore intersubjective and replicable. The process of identification and evaluation of intrinsic value represents a cultural and social/community construct, which can be realized with participatory processes of an interactive and iterative type, by successive approximations.

Once this intrinsic value has been defined, it must be placed in relation to the opportunity costs that result from the conservation of this value. If the opportunity costs are considered too high, i.e. they go beyond a certain tolerable threshold/compatible with a series of constraints that the specific context determines, the cultural site/landscape characterized by the aforementioned intrinsic value will not be preserved. Conservation intervention will only be acceptable if the proposed changes reduce the opportunity costs to a reasonably acceptable level. Naturally, the tolerability/compatibility threshold is also subject to evaluation and

interpretation by the community. In other words, in the light of the above, participatory processes become absolutely necessary in the conservation and management choices, to identify the most satisfactory/reasonable solutions. They are not an option, but they represent a real necessity.

6. Conclusions

In this exploratory paper we tried to analyze a transition between the old-style assessment of cultural heritage and cultural landscapes to new ones, capable to gather the multidimensionality of the tangible and intangible dimension of heritage, considering both instrumental and intrinsic values in planning integrated conservation.

The evaluations so far drawn up on the basis of a utilitarian/anthropocentric approach – in other words on the instrumental value of goods and services, merely on their economic value, of use and even of non-use - are resolved through multiple value assessment methods relying on the WTP. However, as intangible, cultural, philosophical, symbolic, spiritual, religious, etc. values are involved, which cannot be fully or are just partially captured by the WTP, we need to integrate these evaluations with assessments based on a non-utilitarian approach. The assessment of the intrinsic value of cultural heritage is useful in the choice of new use values for the heritage. More in general, the integration of the approach based on instrumental values and intrinsic values may improve the choices of requalification intervention projects and during management processes, towards transforming a heritage asset into a living ecosystem. Actually, the complex social value expresses the integration above. It includes the instrumental values deducted with the instruments offered by the economy, associating also other values deduced through a social assessment.

To be effective and to be able to open future, fruitful perspectives, the evaluation must assume a systemic approach. It is essential to first read the status quo ante, with respect to which a project/plan brings about a process of change, that is a difference that is evaluated in its intensity and efficiency/effectiveness of results.

Therefore, the evaluation of the impacts of the project/plan becomes central. However, it must go beyond the traditional linear proportional cause/effect model, because many impacts are non-linear, as they are characterized by feedback loops, reciprocal interactions that from a certain threshold onwards can develop positive or negative exponential impacts, transforming virtuous processes into vicious processes.

In the research for consensus, which is typical of participatory evaluation processes, it is also necessary to take into account the need to find agreements on the variables to be examined, on the evaluation criteria as well as on the indicators, which can be quite different from those proposed by expert's wisdom.

We need hybrid metrics, both quantitative and qualitative ones. They are complementary each other's as they integrate quantitative approaches of positivist nature (such those of natural and economic sciences) with approaches of constructivist/interpretative nature (non-quantitative), used by human sciences (i.e. anthropology, history, sociology, etc.).

The awareness of the need of going beyond traditional instrumental assessments, looking for integrated ones is fundamental. This is relevant as it can increase the effectiveness of the assessment process and its performance and contribute to identify innovative approaches of evaluation which allow to improve the efficiency /effectiveness of requalification interventions on cultural heritage sites. Specifically, this approach, based on the integration

of instrumental values and on intrinsic values, can find its natural application in Policy Labs practices, which are more and more used.

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